Salary Administration in 8.18

- ***PeopleSoft's Plan Salaries (GBL) Module***

July 2003

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SALARY ADMINSTRATION IN HRIS

An Overview

Salary Management in the Plan Salaries Module is a four-part process.

The 4 Parts:

1. The Employee Review record and a rating must exist for the current period. Employees without a review record will not appear in the Salary "Grid" panel. The rating code "Not Applicable" is considered a rating and can be used when a rating has not been assigned but you want the record to appear in the grid.

   Note: Review type may be either "Annual" or "Probation" with review date <= 9/30/03

2. The Salary "Grid" must be "initialized", updated, and "committed" by each Level 1 for each union code.

3. Compensation department will review and approve each Salary "Grid" before it is uploaded into the employee Job Data records.

4. After the data is uploaded to Job Data, the data is seen in the Administer Workforce pages as effective dated rows in employee data. All will have the effective date10/01/2003.

   Multiple rows in the "Grid" will result in multiple rows in Job Data.

Who's Records get "Initialized" in the Salary Grid?

The Salary Grid is "initialized" by Level 1 and Union Code.

The FX and 99 grids will contain a row of data for employees who meet the following criteria:

1. Have an employee review record for this review period

2. EMPL_CLASS equal to:

Code	Description
A	Term Appointment
I	Intern
N	Career
Q	Rehired Retiree (Non-VERIP)
T	Limited

3. EMPL_STATUS equal to:

Code	Description
A	Active
L	Leave of Absence
P	Leave with Pay
S	Suspended

4. Variable status employees ARE NOT included for union codes FX and 99. (Note: union represented employees are all included regardless of Full/Part/Indet status)

5. The population in the grid is determined by employees who meet the above criteria and are "Active" on a specific "Freeze Date". For the 2003 process, the freeze date is 9/30/03.

Where does data in the Salary Management Grid come from?

The Salary Grid data comes from both the **Job Data** panels and **Employee Review** panels for the current review period.

If data changes in either the employee job data or the review record the Salary Grid must be "Refreshed". To refresh the grid with current data, the row must be deleted and the grid saved prior to running the 'refresh/load' process.

Salary Plan Budgets

The Salary Grid displays the total budget allotment, the amount allocated, and the balance for each allocation type in the bottom third of the screen.

Allocation Budget Types

There are three possible “pots” or allocation budgets from which to distribute pay rate changes:

- **Merit** – Includes % Merit and Merit Lump Sum
- **Job Reclass Promotion** – were job code also changes
- **Equity** – not always available

About the Allocation Budget and Used Totals

1. The allocations are a percentage of the total salaries for employees in each Level1 and Union Code combination as of 9/30/03. Note: Variable status employees are not included in the budget.

2. Budget allocations are system calculated and are dynamic. They will change when actions affecting the population or comp rates for the population are entered with effective dates prior to the freeze date of the Salary Plan year.

   Balanced and budgets will change Orgcode Level 1 changes, Comprate changes, some Jobcode changes.

3. As you change the increase amounts in the Salary Grid, the allocation “used and balance available” will reflect the change

Types of Action/Reasons

Each row in the Salary Grid will transfer into the employee records in Administer Workforce employee panels with an increase effective date of 10/1/01.

An employee may have more than one action in the Salary Grid.

If there are multiple actions, these actions must be entered in a specific order. The sequence should be:

Action	**Reason**	**Description**	**EffDt**	**Seq**
PAY	MER	Merit	10/1/03	1st
PAY	EQA	Equity	10/1/03	2nd
JRC	RPR	Reclass Promotion	10/1/03	After pay actions
LSP	MLS	Merit Lump Sum	10/1/03	any

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Log into PeopleSoft HRIS

Login Procedure

1. Using Internet Explorer, type “http://HRIS.LBL.GOV/HRPRD” in the URL, the login page will display
2. Enter your PeopleSoft Operator ID (ALL CAPS)
3. Enter your password (case sensitive)
4. The window opens to the Home page with your menu groups.

How to Get an Operator ID or Request Access to the Admin Salary – Grid Data pages

Access requests must be approved and requested by the appropriate HR Center manager.

HR Center Managers are Authorized to Request Access:

Computing Sciences	Chris Diesch
General Sciences/LabDir	Colette Gooch
Energy Sciences	Kamala Green
Mat Sc/Chem Sc/ALS	Robert Pettit
Life Sc/Phys Bio/JGI	Nancy Talcott
Technical Services	Gary Lee
Business Services	Diana Attia

All Requests must be sent to
Daisy Guerrero at DCGuerrero@lbl.gov

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The Procedures

The Overall Process – An Overview

1. Run the *Load/Refresh Salary Planning* process. Initializing must be done at least once to populate the "grid" and populate the budget allocation. All subsequent processes are done using the *Load/Refresh Salary Planning* process, which will update review or employee status changes.

   Note: The initialization of Level 2 is done in a similar sequence.

2. Update and review the Salary Grid, use the *Salary Plan Level 1.*

3. Complete the *Justification Panel* for all records displayed using the Justifications WorkFlow panel.

4. After all rows in the Salary Grid are correct and the required justifications are complete – run the *Commit Salary Changes* process. A status report will be printed to your default printer. There must be no errors for the *commit* process to be successful.

5. After Compensation Unit approves the salary grid, print the Salary Pay Notifications in LBNL_Reports.

Procedure - Initializing the Salary Grid

You will use the process called Load/Refresh Salary Planning. It is just like running a report and uses a Run Control ID. The only difference is there is not report output; the data is updated in the grid.

Roadmap

Home > Administer Workforce > Plan Salaries (GBL) > Process > Load/Refresh Salary Planning

Procedure

1. Select **Home, Administer Workforce, Plan Salaries**.
   Then select **Process, Load/Refresh Salary Planning,**

2. Enter your **Run Control ID**.
   Click, "*search" to select your existing Run Control ID*

3. Enter Prompts: **SetID** = **LBL01**, **Level 1** and **Union Code.**

4. Click the **Run** button.

5. In the Process Scheduler Window:
   Server Name: PSUNX
   Output Type and Format: can be left at the default (Web, PDF), there is no hardcopy output, just the new records in the grid.

6. Click, **OK**, you will return to the criteria page. Click, the **Process Monitor** link to view the status of the process as it runs. Click the **"refresh" button** on the page itself (not the browser refresh), to see when the **Run Status** for the process is **"Success"**.

7. Click the **Go Back to Load/Refresh Salary Planning** link to return to the criteria page.

8. Use the links at the top of the page to go to Use, **Salary Plan – Level 1** page to view the data that was loaded in the grid.

Procedure: Selecting Salary Plan Level I

Roadmap

Home > Administer Workforce > Plan Salaries (GBL) > Use > Salary Plan – Level 1

Procedure

1. Select **Home, Administer Workforce, Plan Salaries**.
   Then select **Use, Salary Plan – Level 1**

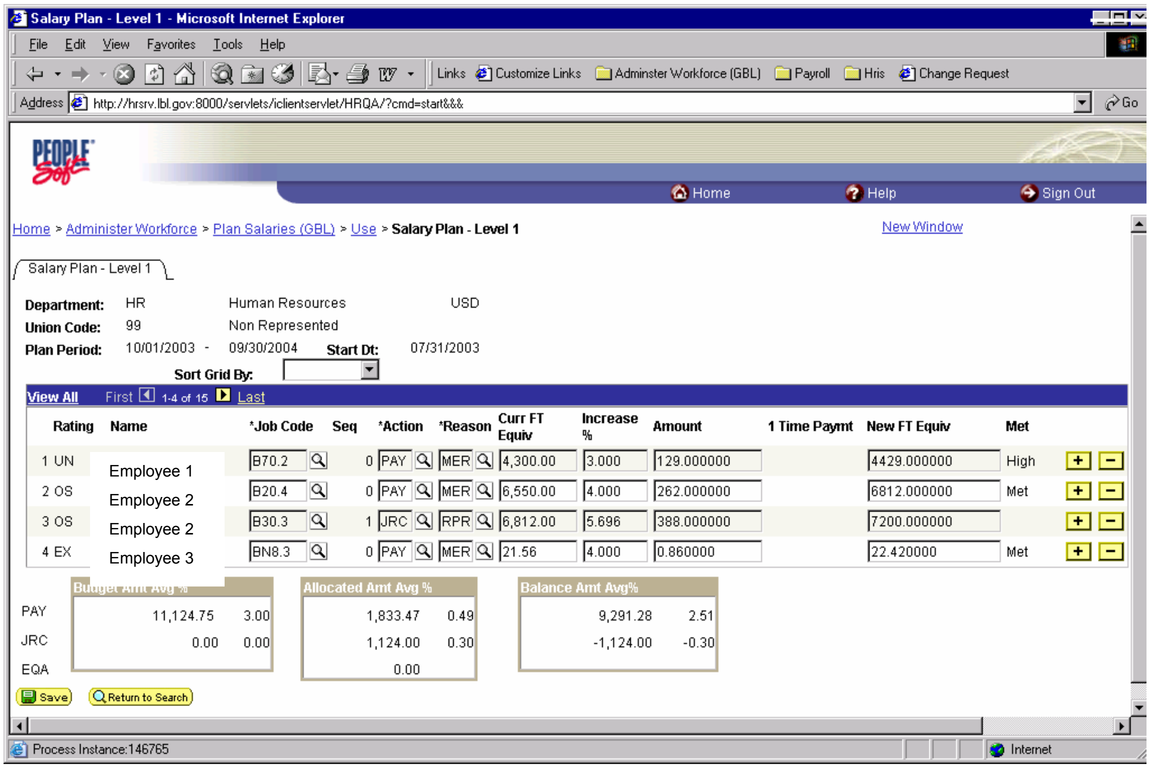
2. Enter your **criteria for the grid you wish to open**. Grids are displayed by Level 1/ Union Code. *Click, "search" to view a complete list of populated grids. Select the current year grid to edit. Current year Budget Start date is 10/1/03.*

3. *The selected grid will display*. **Edit the** existing rows by entering the increase in the **New FTE Comprate** field only. The amount and % of the increase will auto calculate when you exit the data entry field.

   To insert a new row for an employee, place you cursor in any field on the existing row for that employee and click the "plus" button to insert a new row. Edit the Action/Reason, job code, and Curr Ft Equiv as necessary.

4. Click the **Save** button.

Overview of the Salary Grid Page



The Grid Field Definitions

Field Name	Description
1 Time Payment	Field used for Lump Sum merit or reclass payments. This is an annual figure – actual amount to be paid. Only open for data entry on a PAY/LSP row.
Action	Click this field once to enter a MERIT PAY, JOB RECLASS, or LUMP SUM action code. ***Multiple actions for an individual must occur in this order*
Amount	Calculated the merit dollar amount (this is a monthly or hourly rate dependent on the employee's pay class)
Current FT Equiv	Monthly (or hourly) rate of pay *PRIOR* to 10/1 proposed increase
Increase %	Calculates the % increase of that row
Job Code	Code representing job responsibilities of a position
Met	Shows "Met" if an employee's proposed % increase falls within the recommended guidelines. ****If this field shows "High" or "low", a justification is required on the second panel.**
Name	Employee Name
New FT Equiv	Monthly (or hourly) rate of pay *AFTER* 10/1 proposed increase. Data Enter in this field.
Rating	Review Rating. This is populated by the employee's Empl Rvw record.
Reason	Click this field once to chose the appropriate reason for Merit Pay, Reclass Promotion, or Merit Lump Sum
Sequence	Effective Sequence - Sequence number of actions on the same eff date.

About the Grid in 2004:

1. The grid has been simplified to be a data entry tool for proposed increase data. There is some validation of the proposed increase that will assure that the increases meet the compensation guidelines for min and max allowable increases and those that might require a justification.

2. Data entry column is the New FTE Equiv. Increase % and Amount are open for data entry and may be used if necessary; the preferred field is the New FT Equivalent. Enter the amount as the full time comprate even if the person is a part-time employee.

3. The “Grid” default sort order is by Employee ID. Use the **Sort Grid by** field to sort the data by Name. Both the “blank” and the “EmplID” will sort the grid by employee ID.

4. The Initialized or Refreshed Grid <u>may</u> populate the row(s) using the 1st cut matrix as defined by the Compensation group. A 1st cut matrix is not always used or defined. If they are not defined then the “% Increase” and “Amount” will be blank and New FT Equiv will be same as the Curr FT Equiv.

5. The “Met” column displays a value depending on how the system as compared the %Increase to the min/max increase table defined by the Compensation group based on the individuals union and rating. “Met” means that no justification is required. “High” and “Low” values mean that the proposed increase will require a justification. The justification page is located under Use, Salary Plan L1 – Justification. The page displays only employees who require a justification according to the guidelines set by Compensation. Rows for Lump Sum payments and JRC actions will be blank.

6. The budget and allocation figures at the bottom of the Level 1 grid page are displayed in monthly amounts.

7. The summary allocation figures are revised automatically when employees move in or out of your defined Level1/OrgCode set. To see affects of these moves or changes in the Salary “Grid” you will need to run the *Load/Refresh Salary Planning* process.

8. Final monthly salaries round to the nearest dollar ($.50 and above goes up to nearest dollar; $.49 and below goes down to nearest dollar). Hourly rates round to the second decimal place.

Procedures for Actions in the “Grid”

Update an Existing Row – Enter or change an increase amount

To edit existing data follow this procedure.

Procedure

1. Select **Home, Administer Workforce, Plan Salaries**. Then select **Use, Salary Plan – Level 1**

2. Enter your **criteria for the grid you wish to open.**

3. Go to the row you wish to update, enter **”New FT Equivalent”** rate. *Note: The amount and percent or the increase will auto calculate when you tab out of the date entry field.*

4. Click the **Save** button.

Delete a Row from the grid – terms, transfers or data updates

Use this procedure to remove a row from the grid in order to refresh data or to remove an employee who has left your organization (transferred or terminated).

Procedure

1. Select **Home, Administer Workforce, Plan Salaries**. Then select **Use, Salary Plan – Level 1**

2. Enter your **criteria for the grid you wish to open**.

3. Delete - Click the **“minus” button** on the row you wish to delete. Message will display that says the deletion will be complete after the record is saved, click **OK**.

4. Click **Save.**

Insert a Row – Adding an Action

An employee may require more than one row of data for multiple actions.

- When you insert a row for Job Reclass and enter the new job code, the new row will reflect information relating to for the new job code. Be sure the Current and New FT Equiv rates are correct on the inserted row.
- Lump Sum amounts will be assumed to be the ACTUAL AMOUNT to be paid to the employee (It will not adjust itself for part time employees). Lump Sum actions require a Justification.
- Remember the sequence of actions.

Action	Reason	Description	EffDt	Seq
PAY	MER	Merit	10/1/03	1st
PAY	EQA	Equity	10/1/03	2nd
JRC	RPR	Reclass Promotion	10/1/03	After pay actions
LSP	MLS	Merit Lump Sum	10/1/03	any

Procedure

1. Select **Home, Administer Workforce, Plan Salaries**. Then select **Use, Salary Plan – Level 1**
2. Enter your **criteria for the grid you wish to open**.
3. Click the **“plus” button** on the row you wish to duplicate.
4. **Update** the Action and Reason column appropriately.
   a) For a Lump Sum actions – enter the dollar amount in the 1 Time Payment column. Enter the amount as an annual amount. This will be the amount actually paid to the employee.
   b) For Job Reclass action – enter the new Job Code, and “New FT Equiv”.
5. Click **Save**

Note: If Justification is required you will use the “Enter Justification” Use, Salary Plan – Justification page.

Procedure: Refreshing Data in the Salary Grid

If Employee Review Data Changes

If Employee Review Data is revised, the salary management grid must be “refreshed” in the salary management panels.

Procedure

1. Delete the row of old data in the grid.
2. Revise the Employee Review page as necessary.
3. Run the “load/refresh salary planning” process. The revised data will be available in the grid.
4. Edit the grid row as necessary.

If Employee Job Data Changes

If an Employee’s Core Personnel data is changed then the data must be “refreshed” in the salary management panels. Changes to core employee data may include jobcode, orgcode, or salary.

Procedure

1. Delete the row of old data in the grid.
2. Revise the Employee Data in Administer Workforce as necessary.
3. Run the “load/refresh salary planning” process The revised data will be available in the grid.
4. Edit the grid row as necessary.

Procedure: Justification Page

The Justification page is located in Plan Salaries (GBL) under the Use Menu. Only rows in the grid where a justification is required will be presented.

The **Salary Justification** report can be printed to view the status of Justifications for your Level 1/Union code for any given year. It can be used at any time to review Justification status.

Procedure

1. Select **Home, Administer Workforce, Plan Salaries**. Then select **Use, Salary Plan - L1 Justification**

2. **Enter the criteria** for the Justifications you wish to open. **Enter Level 1, Union Code and Budget Start Date = 10/1/03.** A list of employees who require a justification will be presented.

3. Select **the employee** who requires a justification. *The Justification page will be presented*.

4. Enter the Justification in the comment field. If the person has more than one row in grid both rows will be available in the justification page. Be sure you enter the justification on the row where the "Justification Message" field says that a justification is required. Click the **View All** or use the **arrows** to view other data row.

5. Once you have completed the justification, Click **the *"for Compensation Approval"*** check box.

6. When complete click **Save**. You may save **with or without checking** the *"for Compensation Approval"* box. Submitting the justification for review may be done at any time.

Approvals and Denials can be seen on the Justification page or run the Justification report to view current status.

Justifications – Approved or Denied by Compensation

<u>If all justifications are approved</u>, then the process is ocmplete. You can see the status in the Justification page.

<u>If a justification is denied,</u> it may be revised and resubmitted using the "for Compensation Approval" check box on the Justification page.

<u>Note:</u> If the compensation unit denies a justification and you change the data in the grid to an amount that no longer requires a justification, you must delete the old justification.

You must access **Use, Salary Plan - L1 Justification** menu option, delete the justification, and save the record. This will notify the compensation unit that the salary action is now within guidelines.

Procedure to Commit Salary Changes

IMPORTANT: *All salary actions AND justifications MUST be entered and final before you run this process.*

Use the **Pre-Commit Error Check** process to see if you have any unfinished business or if any of the records in your grid will fail. Use the procedure below to run this process.

Procedure

2. Select **Home, Administer Workforce, Plan Salaries**.
   Then select **Process, Commit Salary Changes.**

9. Enter your **Run Control ID**.
   Click, *"search" to select your existing Run Control ID*

10. Enter Prompts: **SetID** = **LBL01**, **Level 1**, **Union Code, and Effective Date = 10/1/03.**

11. Click the **Run** button.

12. In the Process Scheduler Window:
    Server Name: PSUNX
    Output Type and Format: should be Web, PDF

13. Click, **OK**, you will return to the criteria page. Click, the **Process Monitor** link to view the status of the process as it runs. Click the **"refresh" button** on the page itself (not the browser refresh), to see when the **Run Status** for the process is **"Success"**.

14. Click the details link on the process row once it is "successful", click the **view/trace log** link to get to the .pdf report, Click the **.pdf file** in the list to view the report! The report will open in an Adobe Acrobat window. You may view or print the report from the Adobe Acrobat window, close the window when you are done.

15. Click Cancel to return to the **Process Scheduler** window, then click the **Go Back to Load/Refresh Salary Planning** link to return to the criteria page. Proceed in Plan Salaries from there!

Once you commit salary changes, all rows of data in the grid will be "grayed" out and will not allow additional changes

Query

There is one basic query for Salary Administration.

Public: SALARY_PLAN_GRID – reflects the grid data. Employee actions are listed on a single line rather than multiple lines.

Public: SALARY_GRID_VERIFICATION – reflects data from the P2R panels. Use this query to verify that the grid contains everyone eligible for an increase.

Accessing the Query Manager

Roadmap

Home > PeopleTools > Query Manager > Use > Query Manager

How to Run an Existing Query without 'opening the query'

1. **Search for the Query** you wish to run
   - Enter a partial query title and click the Search button (use wildcard, see Appendix A)
   - Leave search criteria blank to view all available Queries
2. Click **Search button** to list available Queries
3. Click the **Run link** on the row for the title you wish to execute, a separate IE window will open to display the prompts and results.
4. Enter **Prompts if applicable** and Click the View Results button. If the query has no prompts your query results will be displayed.
5. Results will display in IE html page. Data can be viewed or downloaded to your desktop.
6. To down load to Excel –**Use the "CSV Text File" link**. Do Not use the "Excel Spreadsheet" link.
   - *CSV Text File link* creates a simple text file that is automatically opened in Excel and easily formatted
   - *Excel Spreadsheet link* creates an excel file with very unfriendly formatting. Not recommended.
7. Save the CSV file to your desktop, rename if desired.
8. Double click the CSV file on your desktop and the file will open in Excel. Format the file as needed. See Query Excel formatting tips listed a below.
9. To exit the query, Close the Query – Results IE window.
10. To run a new query, Activate the Query Manager IE window, it should still be open but minimized.

NOTE: A query must be "SAVED" before it will run. If you edit any part of a query you must first save it before running.

Tips on formatting your Query Output

1. When you first open the CSV file, always format the spreadsheet ad save.
   a. Select all cells in the spreadsheet using the top left cell. Hot Key: Ctrl-A

b. AutoFit the column width – Format, Column, AutoFit Selection. Hot Key: Alt-O,C,A
c. Left Justify all columns – click the Align Left tool bar button
d. Change the .CSV format of the spreadsheet - Save your CSV file, edit the “Save as type” to be Excel Workbook, Click OK.

2. Use Excel’s Format, Cells menu option to standardize field by column. Fields that we suggest formatting are: Numbers (including EmplID), Dates, and Time.

How to Run a Crystal Report

1. **Select the Report** you wish to run (update display mode)
2. Enter a **Run Control ID**
3. Enter **Parameters** or skip to step 4
4. Click the **“Run” button**
5. Select Server Name: **PSNT**
6. Select Type: **Web**
7. Select Format: **PDF**
8. Click **OK**, the report will “process”
9. To view and print the report, Click the **Process Monitor link**
10. Click the **“Refresh” button** until the Run Status is **“Success”**
11. Click **Details link**
12. Click **View Log/Trace link**
13. Click **the *.pdf file link (the name will consist of the file name and run instance #)**
14. **View** and **print** report from Acrobat .pdf file